



# **Trendrating**

## **Products Summary**



**TRENDRATING – DELIVERING ALPHA.**

**MEASURABLE, ACTIONABLE, REPEATABLE.**

**ALTERNATIVE DATA, ADVANCED ANALYTICS AND SOPHISTICATED  
TECHNOLOGY TO IMPROVE ACTIVE MANAGERS PERFORMANCE**

### **MAKE TRENDS WORK FOR YOU**

**The ability to capture trends, profiting from bull markets and avoiding bear phases is the key to superior performance on a consistent basis.** Investors that have a good understanding and a disciplined respect for the specific price trend of securities outperform those that don't. **Any investment strategy can be enhanced by a better synchronization to trend development.**

Most investors use numerous metrics based on fundamental and quantitative data, but very few measure in a proven, objective and systematic way, the real direction of price trends and remain hostage to market noise and opinions, despite the fact that **capturing trends is the key to better returns.**

### **TRENDRATING EDGE**

Trendrating provides advanced analytics designed to capture trends, identifying most of the winners and avoiding a large part of the losers with in a yearly horizon.

Our model offers a unique rating of trends where **A** and **B** indicate a bull trend and **C** and **D** mark bear moves. **We provide a unique edge where A and B rated stocks on average outperform those rated C and D.**

The solution is a powerful complement to the existing analytical process of active equity portfolio managers.



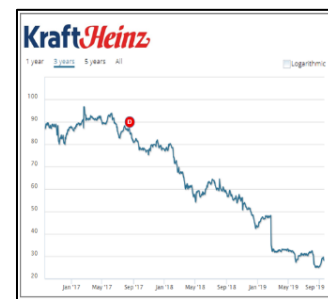
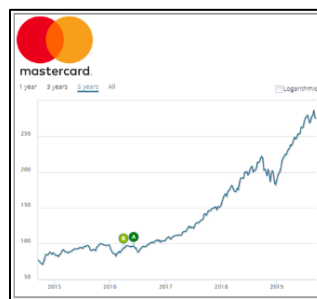


**DATA FEED**

**RATING OF TRENDS**

Rate every stock of your interest :

- Validate opinions and investment ideas.
- Assess trend risks across the holdings.



Get alerts of up/downgrades:

- Spot in time actual trend reversals to identify new opportunities and emerging risks.

Rate your portfolios:

- Add extra intelligence to portfolio analysis and management.
- Use the rating to adjust the exposure and maximize returns.
- Be alerted about downgrades to portfolio rating and act to control the risk of underperformance.



**PERFORMANCE MANAGEMENT PLATFORM**

**RATING OF TRENDS + FUNCTIONALITY**

Leverage Trendrating advanced analytics with a suite providing rich functionality to easily support :

- Screening of long lists of securities.
- Identifying investment opportunities.
- Bring risk control to the next level.
- Analyze and rank sectors and markets.
- Measure the performance dispersion.
- Manage and optimize portfolios.
- Track alerts on stocks and portfolios.
- Test strategies .
- Produce full reports.





**SYSTEMATIC MANAGEMENT SOLUTION**

MODEL + TESTING AND MANAGEMENT PLATFORM = TRENDRATING UNIQUE SOLUTION

Trendrating provides a well proven solution to investors interested in systematic management of equity portfolios. The software is based on a high-performance engine to leverage the model via building, testing, optimizing and managing an investment strategy.

- By applying the Trendrating Systematic Management Solution workflow onto your investment universe, you create a systematic process in which the primary driver is your existing investment process, with the Trend Capture Model added as an overlay.
- Our model, well-validated by more than 100 global clients, is specifically designed to improve the synch with actual trends for any given investment universe.
- Importantly, our Trend Capture Model effectively discriminates between winners and losers over a six to 18-month time horizon, delivering strong alpha capture.
- The Trendrating Systematic Management Solution platform wraps the two together into a robust framework that facilitates the creation and managing of an innovative equity product.

Investment Tilt	Example	Investment Universe
Size	Large, mid, small cap or any combination	Via screening or user provided
Style	Value, growth, ESG, quality, low-volatility, etc. or multi-factor	User provided
Long/Short	Market Neutral, Short Extension	Via screening or user provided


**PORTFOLIO SENTINEL (PLUS)**

The foundation of successful equity investing is capturing the key price trends. It is difficult to perform without a sense and a respect for actual trends, irrespective of other metrics, opinions and market noise. Trendrating makes easier to profit from price trends across stocks. Trendrating invented a way to rate trends, measuring the direction and quality of the actual price trends with a time horizon of 6-to-18 months. The methodology is designed to capture the big money flow in and out of securities, identifying the beginning of trends earlier than old school tools while filtering out price noise and short term volatility. Our model offers a unique rating of trends where **A** and **B** indicate a bull trend and **C** and **D** mark bear moves. We provide a unique edge where **A** and **B** rated stocks on average outperform those rated **C** and **D**. The solution is a powerful complement to the existing analytical process of active equity portfolio managers.

**Trendrating Portfolio Sentinel makes possible to improve returns and control risks with an objective, well validated Systematic Trend Quality Assessment Methodology.**

- ✓ Profit from our proven rating of price trend.
- ✓ Easily spot emerging risks of trend reversals at security, sector and market level.
- ✓ Use the portfolio sentinel app to maximize the performance of your own strategy.
- ✓ Add intelligent trend capture analytics to strengthen your decision making.
- ✓ Capture the winners and avoid the losers.
- ✓ Simulate portfolio optimization and improve the return/risk profile.
- ✓ Get alerted about trend upgrades and downgrades for every holding.
- ✓ Rate the overall exposure to actual trends, the higher the portfolio rating, the higher the expected returns. A low rating indicates high risks to underperform.



**Discover how you can also benefit from our Solutions, and join our 100+ premier clients.**

Contact us at [info@trendrating.net](mailto:info@trendrating.net) or visit [www.trendrating.com](http://www.trendrating.com) to discover more.